



Wanda WorkSmart's


Go Live Checklist for HR Personnel

Workday Go Live: Friday, September 17, 2021











From the desk of Wanda WorkSmart, Welcome to Workday!

The Checklist below is designed to help you become familiar with Workday and verify your information in the new system. Unless otherwise indicated, these tasks should be completed within one week of Go Live.

Click the info icon  for step-by-step instructions on how to complete each task. For answers to Frequently Asked Questions, please refer to the [FAQs](#) on the WorkSmart website.

General

- ☐ 1. Sign into Workday one of three ways 
 - Workday link: <https://wd5.myworkday.com/stateofiowa/d/home.html>
 - Workday icon on your desktop 
 - Or login.iowa.gov
(You must have an Okta account to log into Workday. For more Okta information or assistance visit okta.iowa.gov or contact the OCIO Support Desk at 800-532-1174.)
- ☐ 2. Update your notification preferences 
- ☐ 3. Complete Workday inbox tasks (if any) 
- ☐ 4. Download the Workday Mobile App on Android  or iPhone/iPad 
Note: Check with your internal agency's policies before downloading.
Note: Those who have previously downloaded the app (such as testers) may need to update to the newest tenant.
- ☐ 5. Update your photo (optional) 
- ☐ 6. Verify your name and personal information 

- ☐ 7. Verify your contact information ⓘ
- ☐ 8. Verify your emergency contacts ⓘ
- ☐ 9. Verify your supervisory organization (organizational chart) ⓘ
Note: Report any changes to your HRA.
- ☐ 10. Verify the employees in your supervisory organization (organizational chart) ⓘ

Absence

- ☐ 1. Enter time off dated Friday, September 17, 2021 or later ⓘ
Note: Approved Leave of Absences do not need to be re-entered.
- ☐ 2. If desired, set conversion for sick leave to vacation ⓘ
Note: Settings were not transferred from HRIS.
- ☐ 3. Verify your time off balance after Thursday, September 23, 2021 ⓘ
Note: Leave balances will be accurate once payroll data updates on September 23.
- ☐ 4. Approve your team members' time off ⓘ
Note: Approved Leave of Absences do not need to be re-entered.

Benefits

- ☐ 1. Verify your benefit elections, dependents, and beneficiaries ⓘ

Expenses

- ☐ 1. Submit any travel dated Friday, September 17, 2021 or later ⓘ
Note: Reimbursement of In State and Out of State travel will be processed via Expense Reports in Workday. Please refer to the [list of expenses](#) allowed for Workday Phase 1.

Payroll

- ☐ 1. Verify your payroll payment elections (e.g. bank account, credit union, savings, college savings) ⓘ
- ☐ 2. Verify your federal tax withholding elections ⓘ

- ☐ 3. Verify your state tax withholding elections ⓘ
- ☐ 4. Verify percent-based allowances for assigned employees

Note: Navigate to the employee's Worker Profile > Compensation section > Compensation tab > Plan Assignments Table. If a correction is needed, initiate a compensation change for the worker with a Reason of Variable Compensation Change > Correction. Use an effective date of 9/17/2021. ⓘ

Time Tracking

- ☐ 1. Verify your work schedule ⓘ
- ☐ 2. Verify work schedules for assigned employees ⓘ
- ☐ 3. If applicable, complete your first time entry and submit by Thursday, September 30, 2021 ⓘ

Note: Employees using external time tracking systems such as Kronos will continue for time entry only.

Note: Salaried or "exempt" employees do not need to submit a timesheet unless required by their agency's internal policy, such as those using Work Reporting Codes. ⓘ

- ☐ 4. Approve your team members' time entry by end of business Friday, October 1, 2021 ⓘ

Reporting

- ☐ 1. View reports in Workday ⓘ

Note: Please read the [Workday Reports Crosswalk](#) for additional reference.

Congratulations on your first jump into Workday!

For more information, visit WorkSmart.iowa.gov or email WorkSmart@iowa.gov